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The Tourism Monographs
No 25, August 2001

Ontario's Overnight Cultural Tourists - 1999

Published by the Ministry of Tourism, Culture and Recreation
Printed by the Queen's Printer for Ontario
Province of Ontario, Canada

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ISBN 0-7794-1641-4

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- Highlights -

In 1999, overnight visitors from across Canada and around the world who participated in cultural activities in Ontario accounted for 16.2% (or 6.5 million visits) of the province's total overnight visitors.

Almost half (49.0%) of Ontario's overnight cultural visitors came from Canada, over one third (36.8%) from the United States and 14.2% came from overseas countries.

Overnight visitors from Ontario, Quebec and Manitoba had a low rate of participation in cultural activities in Ontario, while Americans and overseas visitors had a much higher rate of participation. As a result Americans and overseas visitors accounted for a much higher share of overnight cultural visitors than they did of all overnight visitors in Ontario. In general, the further away a visitor to Ontario came from, the higher the chance that he/she will participate in cultural activities.

Ontarians' low participation rate in cultural activities in the province appears to be the result of a "familiarity" syndrome, as well as the fact that the destinations that Ontarians choose within the province are primarily outdoors destinations and not "cultural" destinations. Low participation rates in cultural activities by its own residents were not unique to Ontario, but were also observed among the residents of all other Canadian provinces when they took trips in their own province.

On average, Ontario's overnight cultural visitors spent 4.52 nights in the province in 1999, or 43.0% more than what all overnight visitors to the province spent on average (3.16 nights). As expected, overnight cultural visitors from overseas countries stayed the longest (with Germany and the UK having the longest lengths of stay among overseas countries), followed by Canadians and then Americans.

The overwhelming majority of the overnight cultural visitors from the United States and Ontario were in the province for a getaway trip (1-3 nights).

Although overnight cultural visitors accounted for 16.2% of Ontario's overnight visitors, because of their longer length of stay, they accounted for 23.2% of all the nights spent in the province.

Compared to other overnight visitors, overnight cultural visitors had a much higher incidence of travel during the summer and a much lower incidence of travel during the winter and fall. The majority (52%) of Ontario's overnight pleasure visitors travelled in the province during the July-September period (3rd quarter).

Most of Ontario's overnight cultural visitors (62.3%) came to the province primarily for pleasure. However, a quarter of them were in Ontario primarily to visit friends or relatives and 12.3% were on corporate or personal business trips.

Overnight cultural visitors from Ontario accounted for the highest proportion of Ontario's overnight cultural visitors during the first (47.7%) and third (44.7%) calendar quarters, while cultural visitors from the USA accounted for the highest proportion during the second (39.8%) and fourth quarters (44.1%).

The largest proportion of Ontario's overnight cultural visitors travelled alone (45.1%), followed by cultural visitors in travel parties of two (35.0%). The incidence of travelling with no companions was the lowest among American overnight cultural visitors (only 27.8% of the American overnight cultural visitors travelled alone in Ontario) and the highest among Canadians (56.0%).

Overnight cultural visitors travelled in Ontario mainly without children under the age of 15. France had the lowest incidence of travelling with kids (9.1%) and visitors from Wisconsin had the highest (27.2%).

Compared to other overnight visitors, overnight cultural visitors had a much higher incidence of utilization of commercial roofed accommodation (35.8% vs. 27.7% of their respective person nights), with Americans having the highest incidence of commercial roofed accommodation among all origin groups.

Overnight cultural visitors were twice as active as other overnight visitors, with overnight cultural visitors from overseas countries being the most active. Sightseeing and shopping were almost as popular activities among Ontario's overnight cultural visitors as cultural events were.

The trips that brought overnight cultural visitors to Ontario had primarily an urban orientation. As such, Metro Toronto was the top region visited among overnight cultural visitors, accounting for 32.2% of them. Festival Country was the second most popular region visited by overnight cultural visitors (26.6%), followed by Ontario East (21.8%).

The expenditures of overnight cultural visitors accounted for 29.3% of the total spending in Ontario by all overnight visitors, or $2.8 billion. Overall, overnight cultural visitors had an average spending per person visit that was twice as high as that of all overnight visitors ($433 vs. $239).

Ontario residents had the lowest average spending per overnight cultural visit ($207), as well as per overnight person night ($62). Overnight cultural visitors from the U.S. had an average spending per person visit that was twice as large as that of Ontarians' ($416), while overseas overnight cultural visitors had an average spending per person visit that was five times larger than that of Ontarians' ($1,136), partly because of high transportation costs to reach Ontario.

In 1996 overnight cultural visitors accounted for 15.7% of all overnight visitors in Ontario (5.9 million). This share increased in 1998 by 9.0% to 16.4% (6.47 million), and it remained nearly at that level in 1999 with a slight decrease of 0.3% to 16.2% (6.46 million).

Overnight cultural visitors from other Canadian provinces and overseas countries were mainly responsible for the slight decline of overnight cultural visitors in Ontario. However, compared to 1996, in 1999 the number of overnight cultural visitors increased by 8.7%. The largest increase was realized in the overseas markets with an increased of 21.4%.

The share of overnight cultural visitors from overseas countries increased between 1996 and 1999 from 12.7% to 14.2%. The share of overnight cultural visitors from Ontario remained the same over 1996 at 40.8%, while the share of cultural visitors from other Canadian provinces and the USA declined from 8.6% to 8.2% and 37.9% and 36.8% respectively.

Southwestern Ontario, Festival Country, Lakelands, Getaway Country and Ontario's north experienced increases in overnight cultural visitors between 1996 and 1999, with Lakelands experiencing the largest increase (50.8%). Unfortunately, the three main cultural destinations in Ontario experienced declines in this market and as a result the province also experienced declines over the same period. Metro Toronto's overnight cultural visitors declined by 20.9% in 1999 over 1996, Ontario East' overnight cultural visitors declined by 8.6%, and Festival Country's overnight cultural visitors declined by 2.2%.

- Points Saillants -

En 1999, les touristes provenant du Canada et d'ailleurs qui ont participé à des activités culturelles en Ontario ont représenté 16,2 % des 6,5 millions de visiteurs demeurant plus de 24 heures dans la province.

Presque la moitié (49,0 %) de ces touristes culturels provenaient du Canada, plus du tiers (36,8 %) des États-Unis et 14,2 % d'outre-mer.

Les touristes provenant de l'Ontario, du Québec et du Manitoba ont peu participé aux activités culturelles en Ontario, tandis que les Américains et les touristes d'outre-mer ont participé beaucoup plus. En conséquence, les touristes américains et d'outre-mer représentent une part beaucoup plus grande des visiteurs culturels demeurant plus de 24 heures en Ontario. En général, plus le visiteur arrive de loin, plus il y a de chance qu'il ou elle participe à des activités culturelles en Ontario.

Le faible taux de participation des Ontariens aux activités culturelles dans la province semble provenir du sentiment de « familiarité » et du fait que les Ontariens choisissent d'abord des destinations offrant des activités extérieures dans la province et non des destinations « culturelles ». Le faible taux de participation aux activités culturelles de ses propres résidents n'est pas propre à l'Ontario; on l'a aussi observé chez les résidents de toutes les autres provinces canadiennes en voyage dans leur propre province.

En moyenne, le touriste culturel qui demeure plus de 24 heures en Ontario y a passé 4,52 nuitées en 1999, soit 43 % de plus que tous les autres visiteurs qui demeurent plus de 24 heures dans la province (3,16 nuitées). Comme on s'y attendait, les touristes culturels d'outre-mer sont demeurés le plus longtemps (l'Allemagne et le Royaume-Uni ont remporté la palme des plus longs séjours). Ils sont suivis des Canadiens et des Américains.

L'écrasante majorité des touristes culturels américains et ontariens faisaient un voyage d'agrément dans la province (1 à 3 nuitées).

Les touristes culturels représentaient 16,2 % de tous les visiteurs demeurant plus de 24 heures en Ontario, mais 23,2 % de toutes les nuitées dans la province en raison de leurs séjours plus longs.

Comparativement aux autres visiteurs demeurant plus de 24 heures, les touristes culturels ont voyagé beaucoup plus durant l'été et beaucoup moins l'hiver et l'automne. La majorité (52 %) des visiteurs d'agrément demeurant plus de 24 heures en Ontario se sont déplacés dans la province durant la période de juillet à septembre (3e trimestre).

La plupart des touristes culturels demeurant plus de 24 heures en Ontario (62,3 %) y sont venus pour l'agrément. Cependant, le quart d'entre eux sont d'abord venus en Ontario pour visiter des amis ou des parents et 12,3 % effectuaient des voyages d'affaires personnels ou pour leur employeur.

Pour ce qui est de la provenance des principaux groupes de touristes culturels demeurant plus de 24 heures en Ontario, ce sont les Ontariens qui ont voyagé le plus en Ontario au premier trimestre (11,7 %). Les visiteurs allemands dominent au second trimestre (29,1 %), ceux du Wisconsin, au troisième trimestre (61,6 %) et ceux de la Pennsylvanie, au quatrième trimestre (32,5 %). Les touristes culturels canadiens ont représenté la plus forte proportion de visiteurs culturels en Ontario au cours de tous les trimestres.

La plus forte proportion de touristes culturels demeurant plus de 24 heures en Ontario ont voyagé seuls (45,1 %), les couples (35,0 %) venant en deuxième place. Le nombre de voyages effectués sans compagnon est le plus faible chez les touristes culturels américains (seulement 27,8 % des touristes culturels américains ont voyagé seuls en Ontario) et le plus élevé chez les Canadiens (56 %).

La plupart des touristes culturels demeurant plus de 24 heures ont voyagé en Ontario sans enfant de moins de 15 ans. Les visiteurs français sont ceux qui ont le moins voyagé avec des enfants (9,1 %) et ceux du Wisconsin sont ceux qui ont le plus voyagé avec des enfants (27,2 %).

Comparativement aux autres touristes demeurant plus de 24 heures, les touristes culturels sont de loin ceux qui ont eu le plus recours à l'hébergement commercial (35,8 % par rapport à 27,7 % de leurs nuitées respectives), les Américains étant ceux qui ont le plus utilisé l'hébergement commercial parmi toutes les catégories d'origine.

Les touristes culturels ont été deux fois plus actifs que les autres visiteurs demeurant plus de 24 heures, les touristes culturels d'outre-mer s'avérant les plus actifs. Les visiteurs culturels ontariens ont recherché presque autant les visites touristiques et le magasinage que les événements culturels.

Les touristes culturels en Ontario se sont surtout tournés vers les villes. Le Toronto métropolitain a été la région la plus visitée, soit par 32,2 % des touristes culturels demeurant plus de 24 heures. Le Pays des festivals a été la seconde région la plus populaire (26,6 % des touristes), suivie par l'Est de l'Ontario (21,8 %).

Les dépenses des touristes culturels demeurant plus de 24 heures représentent 29,3 % des dépenses totales en Ontario de tous les touristes demeurant plus de 24 heures, soit 2,8 milliards de dollars. De façon générale, les dépenses des touristes culturels demeurant plus de 24 heures sont deux fois plus élevées que celles de tous les visiteurs demeurant plus de 24 heures (433 $ par rapport à 239 $).Les résidents de l'Ontario ont enregistré la plus faible dépense moyenne par visite culturelle de plus de 24 heures (207 $) et par nuitée (62 $). Les touristes culturels provenant des États-Unis ont dépensé en moyenne par personne par visite deux fois plus que les Ontariens (416 $), et les touristes culturels d'outre-mer ont dépensé cinq fois plus que les Ontariens (1 136 $), en partie à cause des frais de transport élevés pour se rendre en Ontario.

En 1996, les visites culturelles de plus de 24 heures représentaient 15,7 % de toutes les visites de plus de 24 heures en Ontario (5,9 millions). En 1998, cette part augmentait pour s'établir à 16,4 % (6,47 millions). Elle est demeurée presque à ce niveau en 1999 avec une légère baisse de 0,3 % pour se fixer à 16,2 % (6,46 millions).

Le nombre de touristes culturels demeurant plus de 24 heures en Ontario et provenant des autres provinces canadiennes et d'outre-mer accuse une légère baisse. Cependant, par rapport à 1996, ce nombre a augmenté de 8,7 % en 1999. On observe la plus forte augmentation chez les touristes étrangers, soit 21,4 %.

La part des touristes culturels d'outre-mer a augmenté entre 1996 et 1999, passant de 12,7 % à 14,2 %. La part des touristes culturels ontariens demeurant plus de 24 heures est restée la même qu'en 1996, à 40,8 %, alors que celles des autres provinces canadiennes et des États-Unis ont décliné respectivement de 8,6 % à 8,2 % et de 37,9 % à 36,8 %.

Le Sud-ouest de l'Ontario, le Pays des festivals, le Pays des lacs, le Pays de l'évasion et le Nord de l'Ontario ont vu augmenter leur nombre de touristes culturels demeurant plus de 24 heures de 1996

à 1999, la plus importante augmentation (50,8 %) revenant au Pays des lacs. Malheureusement, les trois principales destinations culturelles de l'Ontario ont subi un déclin dans ce marché et, par conséquent, la province a aussi connu une baisse du tourisme culturel durant la même période. Le nombre de touristes culturels demeurant plus de 24 heures dans la région du grand Toronto métropolitain a diminué de 20,9 % en 1999 par rapport à 1996, celui de l'Est de l'Ontario a diminué de 8,6 % et celui du Pays des festivals a diminué de 2,2 %.

- INTRODUCTION -

Definition: In this report a cultural tourist is defined as:

1. an international visitor to Ontario who:
   a. attended festivals or fairs, or
   b. attended cultural events, or
   c. visited zoo, museum or natural display
2. a domestic visitor with an Ontario destination who:
   a. attended festivals or fairs, or
   b. attended a cultural performance, or
   c. attended an aboriginal/native cultural activity, or
   d. visited a museum or art gallery, or
   e. visited a historic site

The information contained in this report was extracted from the micro data files of the Canadian Travel Survey (CTS) and the International Travel Survey (ITS) by Research Resolutions, on behalf of the Ontario Ministry of Tourism, Culture and Recreation (MTCR).

Co-sponsored by all the provinces and the federal government, the CTS is conducted by Statistics Canada annually (starting in 1997) as a supplement to the Labour Force Survey. The CTS telephone interview captures the incidence and detail of travel by Canadians. In 1999, an average of 14,530 Canadian households — including 4,117 Ontario households — were surveyed every month throughout the year. The average response rate for Canadian and Ontario respondents was around 90%.

While up to 1994 only the name of a trip's destination was available from the CTS, as well as the name of the province where an overnight stop might have occurred en route to the trip's destination, starting in 1996 the complete trip itinerary was collected. As such, at the sub-provincial level, only visits with a destination in a specific region are comparable pre and post 1996 and not total domestic visits. In addition to the change in the location question, starting in 1996, the CTS captured the interview data on a CAI system, rather than on paper as was the case up to 1994.

The domestic data contained in this report differ from those reported in print or supplied in electronic format by Statistics Canada in the following ways:

Length of Stay	PLACE OF RESIDENCE	
	Ontario	Other Canada
Same Day	40 Kms one-way from home	80 Kms one-way from home
Overnight	No minimum distance	No minimum distance

1. All overnight trips, regardless of the distance travelled, and same day trips with a minimum one-way distance from a respondent's home of at least 40 kms are included in this report. Statistics Canada reports only trips of 80 kms and over.

2. Overnight trips with an Ontario destination, but no nights spent in the province, are treated in this report as same day trips to Ontario.

3. The domestic data contained in this report include visits in Ontario by Canadians while on trips to any destination, not just Canadian destinations.

Excluded from this report's domestic data are the following types of travel: travel as a member of an operating crew of a bus, plane, truck, etc.; commuting to and from work or school; one way travel involving a change of residence; travel in an ambulance to a hospital or clinic; trips that did not originate in Canada; and trips longer than one year. A domestic trip must also meet a distance requirement as follows:

The ITS is also conducted by Statistics Canada every year with the help of Canada Customs and Immigration authorities who essentially conduct a census of border crossings and distribute the questionnaires to a sample of travellers. The questionnaires are self-completed by the travellers and mailed back to Statistics Canada. The questionnaire that is given to same day visitors from the United States who enter Canada by car does not contain any questions regarding the activities that these visitors engage in during their trip. This is the reason why we have limited our report to overnight visitors only.

The international statistics presented in this report are based on the census of US and overseas visitors as far as the number of travellers, their origin and the mode of transport are concerned. Most of the remaining trip characteristics were obtained from 17,718 completed questionnaires by US residents (out of 34,696 usable questionnaires of US visitors to Canada) and 4,046 completed questionnaires by overseas visitors (out of 8,022 usable questionnaires of overseas visitors to Canada).

The data contained in this report differ from those reported in the Touriscope, or supplied electronically by Statistics Canada, primarily due to the following:

1. Statistics Canada does not allocate Canadian carrier fares to the provinces. Ontario does so based on the mode of transport and the port of entry/exit.

2. Ontario does a number of imputations for missing values.

3. Statistics Canada allocates expenditures to the provinces based on the number of nights a visitor spends in each place. Ontario distinguishes between accommodation expenditures and other expenditures. The former are distributed according to the number of nights a visitor spent in various places and according to whether or not commercial accommodation was used in each overnight stop.

For more details on how Ontario manipulates the database, please write to the address below to obtain the technical appendix.

To aid the reader, a glossary of key terms used throughout this report is appended. For more information on this publication please contact:

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ONTARIO'S OVERNIGHT CULTURAL TOURISTS 1999

HOW MANY VISITORS AND WHERE DID THEY COME FROM?

In 1999, 106 million person visits were made in Ontario by same day and overnight visitors from across Canada and around the world. Those who stayed in Ontario for one or more nights accounted for 37.5% of this total, or for 39.8 million person visits. Of the overnight domestic visitors included in this total (30.2 million), 97.7%, or 29.5 million, visited Ontario as a destination, while the remaining 2.3% visited Ontario while en route to another destination.

Since the activities reported in the travel surveys are those that visitors engaged in during their trip, this report includes only the domestic overnight visitors with an Ontario destination to increase the likelihood that these activities occurred in Ontario. Unfortunately, the international visitors' trip destination is not collected in the international survey. As such, all of the overnight visits from overseas countries and the U.S. have been included in this report. Therefore, the total number of overnight visitors to Ontario that this report will utilise is 39.1 million and not 39.8 million, which includes domestic visitors with an overnight stop in Ontario, but destined to another province or country.

Of Ontario's 39.1 million overnight visitors, 16.2% or 6.5 million visitors participated in cultural activities.

TABLE 1: Overnight Person Visits in Ontario, 1999

Origin of Visitors (000's)	All Visitors	Share (%)	Cultural Visitors	Share (%)
CANADA	30,175	75.7	3,161	49.0
Ontario	26,887	67.5	2,633	40.8
Quebec	1,685	4.2	229	3.5
Manitoba	512	1.3	79	1.2
Atlantic Canada	363	0.9	86	1.3
Western Canada	728	1.8	134	2.1
USA	7,792	19.6	2,376	36.8
Michigan	1,661	4.2	542	8.4
New York	1,449	3.6	460	7.1
Ohio	700	1.8	241	3.7
Pennsylvania	484	1.2	142	2.2
Illinois	415	1.0	111	1.7
Minnesota	308	0.8	41	0.6
Wisconsin	277	0.7	52	0.8
Other USA	2,497	6.3	788	12.2
OVERSEAS	1,875	4.7	919	14.2
UK	382	1.0	184	2.9
Japan	218	0.5	64	1.0
France	157	0.4	106	1.6
Germany	135	0.3	79	1.2
All Other	983	2.5	486	7.5

Out of every twenty overnight cultural visitors who visited Ontario in 1999, eight came from Ontario (40.8%), seven from the U.S. (36.8%), three from an overseas country (14.2%) and two from a province other than Ontario (8.2%). With respect to the overnight cultural visitors from overseas countries, out of every twenty who visited Ontario in 1999, four came from the U.K. (20.0%), two from France (11.5%), two from Germany (8.4%) and two from Japan (7.0%).

A look at Table 1 reveals that Canadians accounted for a much lower share of Ontario's overnight cultural visitors than they did of the total overnight visitors to the province. This was due to the much lower participation rates in cultural activities of visitors from Ontario, Quebec and Manitoba. On the other hand, Americans (with the exception of visitors from Minnesota) and overseas overnight visitors accounted for a much higher share of Ontario's cultural visitors than they did of the province's total overnight visitors.

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A look at Table 1 reveals that Canadians accounted for a much lower share of Ontario's overnight cultural visitors than they did of the total overnight visitors to the province. This was due to the much lower participation rates in cultural activities of visitors from Ontario, Quebec and Manitoba. On the other hand, Americans (with the exception of visitors from Minnesota) and overseas overnight visitors accounted for a much higher share of Ontario's cultural visitors than they did of the province's total overnight visitors.

There are two implications emanating from the data presented in Table 1: First, since cultural activities occur mainly in urban centres, Canadian overnight visitors, especially the ones from Ontario, appear to take trips to Ontario that have more of an outdoor orientation, while Americans and overseas overnight visitors take trips to the province that appear to have more of an urban orientation.

Second, the further away a visitor to Ontario comes from, including visitors from Canada, the more likely this visitor is to participate in a cultural activity. Perhaps this phenomenon can be explained by the fact that Ontarians and their neighbours are familiar with the province's cultural product, especially since most of them reside in urban centres where most of this product is located.

A look at the incidence of participation in cultural activities among residents of other Canadian provinces reveals that this explanation may indeed apply to the rest of Canada and not just to Ontario. For example, 9.8% of the residents of Canadian provinces other than Ontario participated in cultural activities while on an overnight trip in their own provinces, as opposed to 10.0% for Ontarians. However, when Ontarians travel to other Canadian provinces on overnight trips, their participation rate in cultural activities jumps from 10.0% to 19.0%, while when residents of Canadian provinces other than Ontario visit Canada (other than their own province) their participation rate in cultural activities jumps from 9.8% to 19.6%. These numbers indicate that the Ontarians' participation in cultural activities in Ontario is marginally less than that of residents of other Canadian provinces. However, these figures are close enough to provide support to the conjecture that familiarity with one's own cultural product reduces participation in that activity.

An alternative, and/or supplementary, explanation of Ontarians' low participation rate in cultural activities in Ontario may revolve around the hypothesis that participation in cultural activities is not in general the main reason for taking a trip, but rather one of the many activities that visitors engage in while on a trip to a particular destination. Since Ontarians seek mainly outdoor destinations when they travel in Ontario (e.g., Simcoe, Muskoka) and since cultural activities are not readily available in those destinations, the Ontarians' low participation rate in cultural activities follows.

TABLE 2: Overnight Visitors by Length of Stay in Ontario

Origin of Visitors	Average Number of Nights	
	All Visitors	Cultural Visitors
CANADA	2.77	3.82
Ontario	2.55	3.35
Quebec	3.17	2.71
Manitoba	4.32	7.54
Western Canada	7.18	10.10
Atlantic Canada	6.33	7.95
USA	3.32	3.43
Border States	2.97	2.93
New York	2.86	3.16
Michigan	2.34	2.29
Ohio	3.02	2.68
Pennsylvania	3.55	3.42
Minnesota	3.51	5.98
Illinois	3.73	3.53
Wisconsin	4.41	3.58
OVERSEAS	8.66	9.75
UK	9.50	10.46
France	5.18	5.17
Germany	9.03	9.03
Japan	3.41	4.17

HOW LONG DID THEY STAY IN ONTARIO?

Overall, Ontario's overnight cultural visitors stayed in the province much longer than other overnight visitors did (4.52 nights vs. 3.16 nights). As a result, although overnight cultural visitors accounted for 16.2% of all overnight visitors to Ontario, they accounted for 23.2% of all the person nights spent in the province in 1999.

As expected, overnight visitors from overseas countries stayed the longest (with Germany and UK having the longest lengths of stay among overseas countries), followed by Canadians and Americans - a rather surprising result since overnight visitors from the U.S. stay in general longer in Ontario than Canadians.

Three out of every seven (46.7%) of Ontario's overnight cultural visitors stayed in the province for two nights or less and 64.7% stayed for three nights or less. Only 14.8% of Ontario's overnight cultural visitors stayed in the province for ten or more nights.

Overnight cultural visitors from Ontario had the highest incidence (74.9%) of taking a short getaway trip (3 nights or less) in the province, followed by the US (71.6%) and overseas visitors (26.7%).

WHEN DID THEY VISIT ONTARIO?

Compared to other overnight visitors, overnight cultural visitors had a much higher incidence of travel during the summer and a much lower incidence of travel during the remaining seasons.

The majority (52%) of Ontario's overnight cultural visitors travelled in the province during the July-September period (3rd quarter). This observation, however, did not hold across all of Ontario's main markets. For example, the majority of the overnight cultural visitors from New

All Overnight Visitors

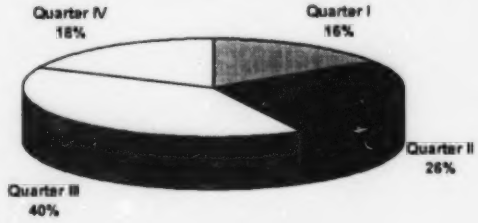

TABLE 3: Overnight Cultural Visits in Ontario by Calendar Quarter, 1999

Origin of Visitors	QI	QII	QIII	QIV
TOTAL	643	1,538	3,344	931
Share (%)	*10.0*	*23.8*	*51.8*	*14.4*
CANADA (000)	383	643	1,743	392
Share (%)	*59.6*	*41.8*	*52.1*	*42.1*
Ontario	307	532	1,495	299
Share (%)	*47.7*	*34.6*	*44.7*	*32.1*
USA (000)	191	612	1,163	411
Share (%)	*29.7*	*39.8*	*34.8*	*44.1*
Border States	140	399	763	287
Share (%)	*21.8*	*25.9*	*22.8*	*30.8*
OVERSEAS (000)	69	283	438	128
Share (%)	*10.7*	*18.4*	*13.1*	*13.7*
UK	13	51	89	32
Share (%)	*2.0*	*3.3*	*2.7*	*3.4*
France	4	30	60	13
Share (%)	*0.6*	*2.0*	*1.8*	*1.4*
Germany	5	23	43	7
Share (%)	*0.8*	*1.5*	*1.3*	*0.8*
Japan	9	15	31	9
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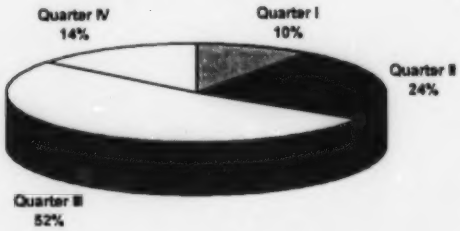
Overnight Cultural Visitors



York, Pennsylvania, Ohio, Illinois, Quebec, the Atlantic provinces, western Canada, the UK, Japan, and from overseas countries other than France and Germany did not come to Ontario during the third calendar quarter.

As Table 3 indicates, overnight cultural visitors from Ontario accounted for the high-

There are two implications emanating from the data presented in Table 1: First, since cultural activities occur mainly in urban centres, Canadian overnight visitors, especially the ones from Ontario, appear to take trips to Ontario that have more of an outdoor orientation, while Americans and overseas overnight visitors take trips to the province that appear to have more of an urban orientation.

Second, the further away a visitor to Ontario comes from, including visitors from Canada, the more likely this visitor is to participate in a cultural activity. Perhaps this phenomenon can be explained by the fact that Ontarians and their neighbours are familiar with the province's cultural product, especially since most of them reside in urban centres where most of this product is located.

A look at the incidence of participation in cultural activities among residents of other Canadian provinces reveals that this explanation may indeed apply to the rest of Canada and not just to Ontario. For example, 9.8% of the residents of Canadian provinces other than Ontario participated in cultural activities while on an overnight trip in their own provinces, as opposed to 10.0% for Ontarians. However, when Ontarians travel to other Canadian provinces on overnight trips, their participation rate in cultural activities jumps from 10.0% to 19.0%, while when residents of Canadian provinces other than Ontario visit Canada (other than their own province) their participation rate in cultural activities jumps from 9.8% to 19.6%. These numbers indicate that the Ontarians' participation in cultural activities in Ontario is marginally less than that of residents of other Canadian provinces. However, these figures are close enough to provide support to the conjecture that familiarity with one's own cultural product reduces participation in that activity.

An alternative, and/or supplementary, explanation of Ontarians' low participation rate in cultural activities in Ontario may revolve around the hypothesis that participation in cultural activities is not in general the main reason for taking a trip, but rather one of the many activities that visitors engage in while on a trip to a particular destination. Since Ontarians seek mainly outdoor destinations when they travel in Ontario (e.g., Simcoe, Muskoka) and since cultural activities are not readily available in those destinations, the Ontarians' low participation rate in cultural activities follows.

TABLE 2 Overnight Visitors by Length of Stay in Ontario

Origin of Visitors	Average Number of Nights	
	All Visitors	Cultural Visitors
CANADA	2.77	3.82
Ontario	2.55	3.35
Quebec	3.17	2.71
Manitoba	4.32	7.54
Western Canada	7.18	10.10
Atlantic Canada	6.33	7.95
USA	3.32	3.43
Border States	2.97	2.93
New York	2.86	3.16
Michigan	2.34	2.29
Ohio	3.02	2.68
Pennsylvania	3.55	3.42
Minnesota	3.51	5.98
Illinois	3.73	3.53
Wisconsin	4.41	3.58
OVERSEAS	8.66	9.75
UK	9.50	10.46
France	5.18	5.17
Germany	9.03	9.03
Japan	3.41	4.17

HOW LONG DID THEY STAY IN ONTARIO?

Overall, Ontario's overnight cultural visitors stayed in the province much longer than other overnight visitors did (4.52 nights vs. 3.16 nights). As a result, although overnight cultural visitors accounted for 16.2% of all overnight visitors to Ontario, they accounted for 23.2% of all the person nights spent in the province in 1999.

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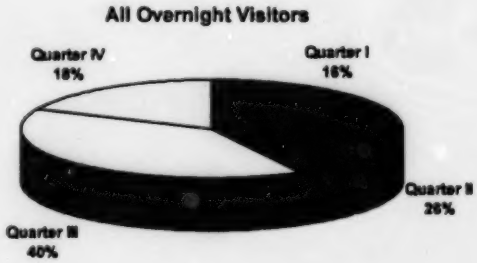

The majority (52%) of Ontario's overnight cultural visitors travelled in the province during the July-September period (3rd quarter). This observation, however, did not hold across all of Ontario's main markets. For example, the majority of the overnight cultural visitors from New York, Pennsylvania, Ohio, Illinois, Quebec, the Atlantic provinces, western Canada, the UK, Japan, and from overseas countries other than France and Germany did not come to Ontario during the third calendar quarter.

TABLE 3: Overnight Cultural Visits in Ontario by Calendar Quarter, 1990

Origin of Visitors	QI	QII	QIII	QIV
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Share (%)	*59.6*	*41.8*	*52.1*	*42.1*
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As Table 3 indicates, overnight cultural visitors from Ontario accounted for the high-

est proportion of Ontario's overnight cultural visitors during the first (47.7%) and third (44.7%) calendar quarters, while cultural visitors from the USA accounted for the highest proportion during the second (39.8%) and fourth quarters (44.1%).

WHAT WAS THE MAIN PURPOSE OF THEIR TRIP?

The majority (62.3%) of Ontario's overnight cultural visitors were visiting the province primarily for pleasure. However, a significant portion of them was in the province primarily to visit their friends or relatives (25.4%) and about ten percent were in Ontario for business or other personal reasons (8.5% for business and 3.8% for personal reasons).

As Table 4 demonstrates, the proportion of cultural visitors who visited the province for pleasure varied considerably among the various origin groups, with cultural visitors from the U.S. states bordering the Great Lakes having the highest incidence of pleasure travel and overseas cultural visitors having the lowest.

Cultural visitors from the UK had the highest incidence of VFR travel, while cultural visitors from the USA had the highest incidence of business travel.

Among Ontario's main overseas markets, France had the highest proportion of overnight cultural visitors who came to Canada for pleasure (72.6%). The UK had the highest proportion of cultural visitors who came to Canada primarily to visit friends or relatives (42.6%), and Japan had the highest proportion of cultural visitors who came to Canada primarily for business (28.1%).

TABLE 4: Overnight Cultural Visits in Ontario by Main Purpose and Origin, 1999

Origin of visitors	Main Purpose of Trip			
	Pleasure	Visit Friends/ Relatives	Business	Personal/ Other
TOTAL (000's)	4,019	1,641	551	243
Share	62.3	25.4	8.5	3.8
CANADA (000's)	1,812	1,006	217	127
Share	57.3	31.8	6.9	4.0
Ontario (000's)	1,603	794	125	111
Share	60.9	30.2	4.7	4.2
Quebec (000's)	123	794	43	5
Share	53.5	25.7	18.7	2.2
Other Canada (000's)	85	153	179	15
Share	19.7	35.4	41.4	3.5
USA (000's)	1,758	326	206	84
Share	74.1	13.7	8.7	3.5
Border States (000's)	1,257	202	71	58
Share	79.2	12.7	4.5	3.7
New York (000's)	348	82	14	16
Share	75.7	17.8	3.0	3.5
Michigan (000's)	443	61	19	20
Share	81.6	11.2	3.5	3.7
Other USA (000's)	501	124	135	27
Share	63.7	15.8	17.2	3.4
OVERSEAS (000's)	449	309	128	32
Share	48.9	33.7	13.9	3.5
UK (000's)	93	78	6	6
Share	50.8	42.6	3.3	3.3
France (000's)	77	22	3	4
Share	72.6	20.8	2.8	3.8
Germany (000's)	48	24	6	1
Share	60.8	30.4	7.6	1.3
Japan (000's)	33	13	18	-
Share	51.6	20.3	28.1	-
All other (000's)	198	172	94	22
Share	40.7	35.4	19.3	4.5

WHAT WAS THE SIZE AND COMPOSITION OF THEIR TRAVEL PARTY?

The largest proportion of Ontario's overnight cultural visitors travelled alone (45.1%), followed by cultural visitors in travel parties of two (35.0%). The incidence of travelling with no companions was the lowest among American overnight cultural visitors (only 27.8% of the American overnight cultural visitors travelled alone in Ontario) and the highest among Canadians (56.0%).

Twenty-five out of every thirty travel parties (83.6%) who engaged in cultural activities while on an overnight trip travelled in groups comprised of adults only, and about five-in-thirty (16.4%) travelled with children under the age of 15. Of those travelling in adult parties, 48.3% travelled in groups comprised of one adult, 44.1% travelled in groups comprised of two adults and 7.6% in groups comprised of three or more adults.

TABLE 5: Overnight Party Visits in Ontario
Cultural Visitors, 1999

Origin of Visitors	Average Party Size (persons)	Party Composition	
		Adults only	Adults with Kids
CANADA	1.76	82.0%	18.0%
Ontario	1.82	79.9%	20.1%
USA	2.26	84.0%	16.0%
Border States	2.36	83.3%	16.7%
OVERSEAS	1.94	89.9%	10.1%
UK	1.98	88.9%	11.1%
France	1.97	90.9%	9.1%
Germany	2.03	88.6%	11.4%
Japan	1.85	89.7%	10.3%

The incidence of travel in groups comprised of two adults only was the highest among overnight cultural visitors from Pennsylvania and New York (63.6% and 57.2%, respectively).

Relative to other groups, Ontarians and other Canadians, had a low incidence of travel in groups comprised of two adults only (25.0% and 18.8%, respectively). These groups also had the highest incidence of travelling alone (53.1% and 68.0%, respectively), while Ontarians had the third highest incidence of travelling with children (20.1%), after Wisconsin (27.2%) and Manitoba (20.4%).

WHAT TYPE OF ACCOMMODATION DID THEY USE?

Compared to other overnight visitors, overnight cultural visitors had a higher incidence of utilisation of commercial roofed accommodation (35.8% vs. 27.7% of their respective person nights were spent in commercial roofed accommodation) and a lower incidence of utilisation of non-commercial accommodation (47.8% vs. 56.4% of their respective person nights). They also had

TABLE 6: Overnight Visitors in Ontario
Percent of Visitors by Activity, 1999

Activity	All Visitors %	Cultural Visitors %
Visit friends/relatives	58.1	48.7
Attend festivals/fairs	5.3	30.7
Attend cultural events	13.2	74.7
Attend sports events	5.4	9.0
Shopping	34.7	66.0
Sightseeing/cruising	30.6	71.8
Nightlife/entertainment	12.1	24.7
Visit theme parks	3.3	11.3
Visit parks or historic sites	14.0	45.3
Participate in outdoor activities	36.8	37.3

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Visit parks or historic sites	14.0	45.3
Participate in outdoor activities	36.8	37.3

a much higher incidence of utilization of hotels (24.0% vs. 16.7%) and, as expected, a lower incidence of utilisation of camping/trailer parks (6.2% vs. 8.1%).

These observations varied considerably among overnight cultural visitors from different origins. For example, 27.6% of the Canadian overnight cultural visitors used roofed commercial accommodation, 9.9% used campgrounds and 58.4% used non-commercial accommodation, such as the homes of friends/relatives, or private cottages. On the other hand, 55.1% of the overnight cultural visitors from the U.S. used commercial roofed accommodation, 5.1% used campgrounds and 26.0% used the homes of friends or relatives, or private cottages. Overnight cultural visitors from overseas countries had an incidence of utilisation of accommodation types similar to that of Canadians with the exception of campgrounds where they exhibited the lowest utilisation rate among all origin groups (2.3%).

WHAT ELSE DID THEY DO IN ONTARIO?

Overnight cultural visitors were twice as active as other overnight visitors participating, on average, in 4.04 of the activities listed in Table 6, as opposed to 2.13 activities for the overall overnight visitors. Visiting friends or relatives was the only activity where overnight cultural visitors had a lower incidence of participation in when compared to other overnight visitors.

TABLE 7: Overnight Cultural Visitors in Ontario
Percent of Visitors Who Participated in Selected Activities, 1999

Activity	Origin of Overnight Cultural Visitors			
	Canada	Ontario	USA	Overseas
Visit friends/relatives	60.3%	57.7%	27.7%	63.4%
Attend festivals/fair	37.4%	39.8%	23.7%	25.8%
Attend cultural events	58.9%	56.5%	88.6%	93.1%
Attend sports events	9.0%	8.9%	7.1%	14.6%
Shopping	50.0%	49.3%	77.5%	91.3%
Sightseeing	62.5%	61.6%	77.9%	88.4%
Nightlife/entertainment	22.1%	20.6%	26.1%	30.2%
Visit theme parks	8.5%	7.9%	9.3%	25.8%
Visit parks or historic sites	38.3%	37.6%	46.3%	66.6%
Participate in outdoor activities	46.2%	47.5%	26.9%	33.2%

Naturally, attending cultural events was the most popular activity among overnight cultural visitors, followed closely by sightseeing and shopping. This observation supports the conjecture that cultural activities was not, by and large, the main reason for bringing these visitors to Ontario.

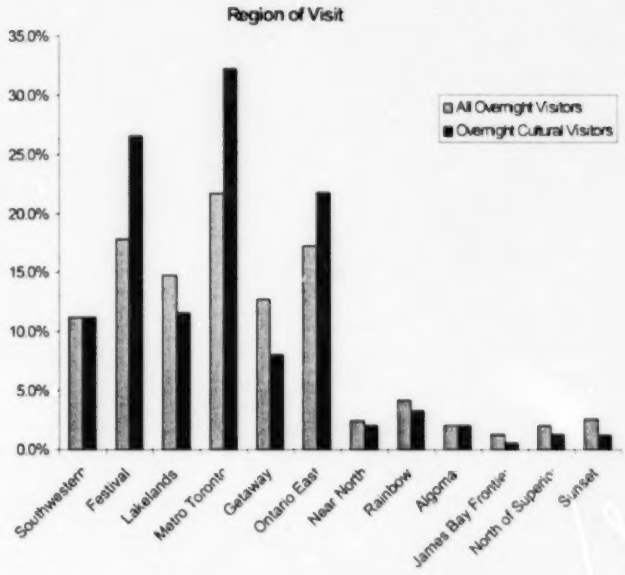
Overnight cultural visitors from Ontario were much more inclined to participate in outdoor activities than the corresponding visitors from the U.S., or overseas countries (47.5% of Ontarians did so as opposed to 26.9% of Americans and 33.2% of overseas overnight cultural visitors).

On the other hand, Americans and overseas cultural visitors were much more inclined to go sightseeing, to go shopping, to engage in nightlife/ entertainment and to visit parks and historic sites. Surprisingly, overnight cultural visitors from overseas countries had one of the highest incidences of visiting friends or relatives and the highest incidence of visiting a theme park (the latter is surprising because overnight cultural visitors from overseas countries had the lowest incidence of travel with children under the age of 15).

Overnight cultural visitors from overseas countries were the most active, participating, on average, in 5.1 activities, while those from the U.S. and Ontario participated, on average, in 4.1 and 3.9 activities, respectively.

WHICH ONTARIO REGIONS DID THEY VISIT?

As the chart to the right demonstrates, Metro Toronto's dominance in the overnight market increased significantly among overnight cultural visitors as the region accounted for 32.2% of them. Toronto was followed by Festival Country (26.6%) and Ontario East (21.8%). Compared to their presence in the total overnight market, these three regions along with Algoma Country were the only ones that experienced an increase in their share of overnight cultural visitors, with Festival Country experiencing the largest increase (up by 33.0%).



It was inferred earlier, that overnight cultural visitors, when compared to other overnight visitors, appear to have more of an urban orientation. The data presented in this section provide additional support to that opinion.

TABLE 8: Overnight Cultural Visitors in Ontario, 1999

Region Visited	Percent of Overnight Cultural Visitors, by Origin, Visiting each Ontario Travel Region*								
	Canada	Ontario	USA	Border States	Overseas	UK	France	Germany	Japan
Southwestern Ontario	9.8%	10.9%	15.5%	19.0%	5.1%	7.6%	0.9%	8.9%	0.0%
Festival Country	15.8%	16.9%	37.9%	36.6%	34.2%	39.1%	37.7%	49.4%	34.4%
Lakelands	18.4%	21.5%	3.7%	3.5%	8.5%	15.8%	0.9%	20.3%	0.0%
Metro Toronto	17.8%	14.5%	37.3%	35.6%	68.6%	60.3%	76.4%	72.2%	59.4%
Getaway Country	11.3%	11.8%	3.8%	2.3%	7.7%	12.0%	3.8%	2.5%	1.6%
Ontario East	23.5%	19.6%	14.7%	12.2%	34.2%	25.0%	66.0%	27.8%	23.4%
Near North	2.9%	3.4%	0.9%	0.4%	2.3%	3.8%	0.0%	6.3%	3.1%
Rainbow Country	4.9%	5.5%	1.7%	1.6%	2.1%	3.3%	0.0%	7.6%	0.0%
Algoma Country	1.3%	1.3%	3.4%	2.3%	1.2%	1.6%	0.0%	1.3%	3.1%
James Bay Frontier	0.8%	0.9%	0.3%	0.3%	0.4%	0.5%	0.0%	2.5%	0.0%
North of Superior	1.4%	1.2%	1.4%	1.4%	0.9%	0.5%	0.0%	3.8%	0.0%
Sunset Country	1.6%	0.6%	1.0%	1.1%	0.7%	0.5%	0.0%	3.8%	0.0%

* The percentages are based on the total number of visitors with a known regional destination in Ontario.

Metro Toronto was the most popular region among overnight cultural visitors from overseas countries and Canadian provinces other than Ontario, the second most popular region among American overnight cultural visitors and the fourth most popular region among Ontario residents (who favoured Lakelands).

a much higher incidence of utilization of hotels (24.0% vs. 16.7%) and, as expected, a lower incidence of utilisation of camping/trailer parks (6.2% vs. 8.1%).

These observations varied considerably among overnight cultural visitors from different origins. For example, 27.6% of the Canadian overnight cultural visitors used roofed commercial accommodation, 9.9% used campgrounds and 58.4% used non-commercial accommodation, such as the homes of friends/relatives, or private cottages. On the other hand, 55.1% of the overnight cultural visitors from the U.S. used commercial roofed accommodation, 5.1% used campgrounds and 26.0% used the homes of friends or relatives, or private cottages. Overnight cultural visitors from overseas countries had an incidence of utilisation of accommodation types similar to that of Canadians with the exception of campgrounds where they exhibited the lowest utilisation rate among all origin groups (2.3%).

WHAT ELSE DID THEY DO IN ONTARIO?

Overnight cultural visitors were twice as active as other overnight visitors participating, on average, in 4.04 of the activities listed in Table 6, as opposed to 2.13 activities for the overall overnight visitors. Visiting friends or relatives was the only activity where overnight cultural visitors had a lower incidence of participation in when compared to other overnight visitors.

TABLE 7: Overnight Cultural Visitors in Ontario
Percent of Visitors Who Participated in Selected Activities, 1999

Activity	Origin of Overnight Cultural Visitors			
	Canada	Ontario	USA	Overseas
Visit friends/relatives	60.3%	57.7%	27.7%	63.4%
Attend festivals/fair	37.4%	39.8%	23.7%	25.8%
Attend cultural events	58.9%	56.5%	88.6%	93.1%
Attend sports events	9.0%	8.9%	7.1%	14.6%
Shopping	50.0%	49.3%	77.5%	91.3%
Sightseeing	62.5%	61.6%	77.9%	88.4%
Nightlife/entertainment	22.1%	20.6%	26.1%	30.2%
Visit theme parks	8.5%	7.9%	9.3%	25.8%
Visit parks or historic sites	38.3%	37.6%	46.3%	66.6%
Participate in outdoor activities	46.2%	47.5%	26.9%	33.2%

Naturally, attending cultural events was the most popular activity among overnight cultural visitors, followed closely by sightseeing and shopping. This observation supports the conjecture that cultural activities was not, by and large, the main reason for bringing these visitors to Ontario.

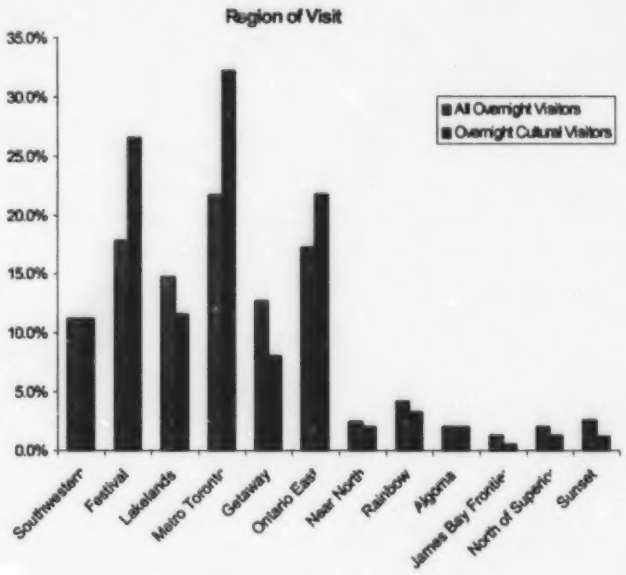
Overnight cultural visitors from Ontario were much more inclined to participate in outdoor activities than the corresponding visitors from the U.S., or overseas countries (47.5% of Ontarians did so as opposed to 26.9% of Americans and 33.2% of overseas overnight cultural visitors).

On the other hand, Americans and overseas cultural visitors were much more inclined to go sightseeing, to go shopping, to engage in nightlife/ entertainment and to visit parks and historic sites. Surprisingly, overnight cultural visitors from overseas countries had one of the highest incidences of visiting friends or relatives and the highest incidence of visiting a theme park (the latter is surprising because overnight cultural visitors from overseas countries had the lowest incidence of travel with children under the age of 15).

Overnight cultural visitors from overseas countries were the most active, participating, on average, in 5.1 activities, while those from the U.S. and Ontario participated, on average, in 4.1 and 3.9 activities, respectively.

WHICH ONTARIO REGIONS DID THEY VISIT?

As the chart to the right demonstrates, Metro Toronto's dominance in the overnight market increased significantly among overnight cultural visitors as the region accounted for 32.2% of them. Toronto was followed by Festival Country (26.6%) and Ontario East (21.8%). Compared to their presence in the total overnight market, these three regions along with Algoma Country were the only ones that experienced an increase in their share of overnight cultural visitors, with Festival Country experiencing the largest increase (up by 33.0%).



It was inferred earlier, that overnight cultural visitors, when compared to other overnight visitors, appear to have more of an urban orientation. The data presented in this section provide additional support to that opinion.

TABLE 8: Overnight Cultural Visitors in Ontario, 1999

Region Visited	Percent of Overnight Cultural Visitors, by Origin, Visiting each Ontario Travel Region*								
	Canada	Ontario	USA	Border States	Overseas	UK	France	Germany	Japan
Southwestern Ontario	9.8%	10.9%	15.5%	19.0%	5.1%	7.6%	0.9%	8.9%	0.0%
Festival Country	15.8%	16.9%	37.9%	36.6%	34.2%	39.1%	37.7%	49.4%	34.4%
Lakelands	18.4%	21.5%	3.7%	3.5%	8.5%	15.8%	0.9%	20.3%	0.0%
Metro Toronto	17.8%	14.5%	37.3%	35.6%	68.6%	60.3%	76.4%	72.2%	59.4%
Getaway Country	11.3%	11.8%	3.8%	2.3%	7.7%	12.0%	3.8%	2.5%	1.6%
Ontario East	23.5%	19.6%	14.7%	12.2%	34.2%	25.0%	66.0%	27.8%	23.4%
Near North	2.9%	3.4%	0.9%	0.4%	2.3%	3.8%	0.0%	6.3%	3.1%
Rainbow Country	4.9%	5.5%	1.7%	1.6%	2.1%	3.3%	0.0%	7.6%	0.0%
Algoma Country	1.3%	1.3%	3.4%	2.3%	1.2%	1.6%	0.0%	1.3%	3.1%
James Bay Frontier	0.8%	0.9%	0.3%	0.3%	0.4%	0.5%	0.0%	2.5%	0.0%
North of Superior	1.4%	1.2%	1.4%	1.4%	0.9%	0.5%	0.0%	3.8%	0.0%
Sunset Country	1.6%	0.6%	1.0%	1.1%	0.7%	0.5%	0.0%	3.8%	0.0%

* The percentages are based on the total number of visitors with a known regional destination in Ontario.

Metro Toronto was the most popular region among overnight cultural visitors from overseas countries and Canadian provinces other than Ontario, the second most popular region among American overnight cultural visitors and the fourth most popular region among Ontario residents (who favoured Lakelands).

Festival Country was the most popular region among overnight cultural visitors from the U.S., second in popularity among overnight cultural visitors from overseas countries and third among Canadian provinces other than Ontario.

Ontario East was the most popular region for overnight cultural visitors from Canadian provinces other than Ontario, and second among overnight cultural visitors from overseas countries.

Metro Toronto had the highest proportion of overnight cultural visitors from outside Ontario (81.6%), mainly because of visitors from the U.S. and overseas countries. It also had the most diversified cultural market in that its top four markets accounted only for 41.2% of its cultural visitors (as compared to Lakelands where one market only, Ontario, accounted for 75.5% of its cultural visitors).

Overnight cultural visitors from overseas countries moved around the province much more than overnight cultural visitors from other origins, visiting on average 1.6 Ontario travel regions. Overnight cultural visitors from the U.S. visited on average, 1.2 travel regions and Canadians 1.0 region. Overnight cultural visitors from Germany moved around the province the most, visiting on average 2.0 travel regions.

These observations seem to validate the data presented earlier on activities which showed that overnight cultural visitors from overseas countries had the highest incidence of participation in sightseeing (88.4%), followed by Americans.

Five out of the twelve Ontario travel regions drew the majority of their overnight cultural visitors from Ontario, while overseas countries played somewhat of a role in Metro Toronto, James Bay Frontier, Near North, Ontario East, Getaway Country and Lakelands. The U.S. played a significant role in Southwestern Ontario and Festival Country.

TABLE 9: The Top Overnight Cultural Markets for each one of Ontario's Travel Regions, 1990

Region Visited	% of a Region's Overnight Cultural Visitors Coming from (Origin):	
Southwestern Ontario	Ontario (286,000)	39.4
	Michigan (179,000)	24.7
	Illinois (39,000)	5.4
	Ohio (36,000)	5.0
Festival Country	Ontario (445,000)	25.9
	Michigan (161,000)	9.4
	New York (156,000)	9.1
	Ohio (131,000)	7.6
Lakelands	Ontario (565,000)	75.5
	Michigan (36,000)	4.8
	UK (29,000)	3.9
	Germany (16,000)	2.1
Metro Toronto	Ontario (382,000)	18.4
	New York (184,000)	8.8
	Michigan (182,000)	8.7
	UK (111,000)	5.3
Getaway Country	Ontario (312,000)	60.2
	UK (22,000)	4.2
	Quebec (21,000)	3.5
	New York (16,000)	3.5
Ontario East	Ontario (517,000)	36.8
	Quebec (131,000)	9.3
	New York (119,000)	8.5
	France (70,000)	5.0
Near North	Ontario (90,000)	67.2
	UK (7,000)	5.2
	Germany (5,000)	3.7
	New York (4,000)	3.0
Rainbow Country	Ontario (146,000)	68.2
	Pennsylvania (10,000)	4.7
	Ohio (9,000)	4.2
	Germany (6,000)	2.8
	UK (6,000)	2.8
Algoma Country	Ontario (35,000)	26.3
	Michigan (11,000)	8.3
	Wisconsin (8,000)	6.0
	Ohio (5,000)	3.8
James Bay Frontier	Ontario (23,000)	63.9
	Western Canada (2,000)	5.6
	Michigan (2,000)	5.6
	Germany (2,000)	5.6
North of Superior	Ontario (31,000)	35.6
	Manitoba (11,000)	12.6
	Minnesota (10,000)	11.5
	Wisconsin (7,000)	8.0
Sunset Country	Manitoba (32,000)	39.5
	Ontario (17,000)	21.0
	Minnesota (9,000)	11.1
	Michigan (4,000)	4.9

HOW MUCH DID THEY SPEND IN ONTARIO?

The expenditures of overnight cultural visitors accounted for 29.3% of the total spending in Ontario by all overnight visitors, or almost double the proportion of trips that the overnight cultural visitors accounted for (16.2%). This implies that overnight cultural visitors spent more per person trip than other overnight visitors to Ontario did.

Although visitors from Ontario accounted for 33.8% of the total spending in Ontario by all overnight visitors, they only accounted for 19.5% of the spending of overnight cultural visitors. On the other hand, the proportion of the overnight cultural visitors' spending that was accounted for by visitors from the United States and overseas countries increased when compared to the proportion of the total overnight expenditures accounted for by visitors from these countries. In addition to Ontario, Quebec also saw a decline in their share of expenditures that they accounted for among overnight cultural visitors. Spending by visitors from Pennsylvania remained the same.

TABLE 10: Total Spending Assigned to Ontario from Overnight Visitors, 1999

Visitors' Origin	All Overnight Visitors (000's)	Share	Overnight Cultural Visitors (000's)	Share
TOTAL	$9,541,396	100.0 %	$2,793,996	100.0 %
CANADA	$4,200,457	44.0%	$761,220	27.2%
Ontario	$3,227,602	33.8%	$544,659	19.5%
Quebec	$402,100	4.2%	$60,003	2.1%
USA	$3,267,812	34.2%	$988,706	35.4%
Michigan	$405,922	4.3%	$160,551	5.7%
New York	$385,474	4.0%	$144,716	5.2%
Ohio	$247,614	2.6%	$86,430	3.1%
Pennsylvania	$173,603	1.8%	$49,061	1.8%
OVERSEAS	$2,073,127	21.7%	$1,044,070	37.4%
UK	$482,308	5.1%	$239,617	8.6%
France	$114,226	1.2%	$72,050	2.6%
Germany	$141,146	1.5%	$84,117	3.0%
Japan	$217,434	2.3%	$79,913	2.9%

TABLE 11: Overnight Visitors, 1999 Average Expenditures in Ontario

Origin of Visitors	All Overnight Visitors		Overnight Cultural Visitors	
	Average per Person	Average per Person-Night	Average per Person	Average per Person-Night
TOTAL	$239	$76	$433	$96
CANADA	$139	$50	$241	$63
Ontario	$120	$47	$207	$62
Quebec	$239	$75	$262	$97
USA	$419	$126	$416	$121
Michigan	$244	$104	$296	$130
New York	$266	$93	$315	$100
Ohio	$354	$117	$359	$134
Pennsylvania	$359	$101	$346	$101
OVERSEAS	$1,106	$128	$1,136	$116
UK	$1,263	$133	$1,302	$125
France	$728	$140	$680	$131
Germany	$1,046	$116	$1,065	$99
Japan	$997	$293	$1,249	$299

For overnight cultural visitors from Ontario and Quebec, the decline in their expenditure shares was a consequence of the fact that they accounted for a smaller proportion of overnight cultural visitors than they did of total overnight visitors. However, as Table 1 shows, that was not the case for the overnight visitors from Pennsylvania. They accounted for 1.2% of all overnight visitors, but for 2.2% of the overnight cultural visitors.

Festival Country was the most popular region among overnight cultural visitors from the U.S., second in popularity among overnight cultural visitors from overseas countries and third among Canadian provinces other than Ontario.

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	UK (7,000)	5.2
	Germany (5,000)	3.7
	New York (4,000)	3.0
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	Ohio (9,000)	4.2
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	UK (6,000)	2.8
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	Wisconsin (8,000)	6.0
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For overnight cultural visitors from Ontario and Quebec, the decline in their expenditure shares was a consequence of the fact that they accounted for a smaller proportion of overnight cultural visitors than they did of total overnight visitors. However, as Table 1 shows, that was not the case for the overnight visitors from Pennsylvania. They accounted for 1.2% of all overnight visitors, but for 2.2% of the overnight cultural visitors.

Table 11 shows the average spending per person visit, as well as per person-night, for all overnight visitors and compares these statistics to those of the overnight cultural visitors. Overall, overnight cultural visitors had an average spending per person visit of $433, as compared to an average of $239 for the general overnight visitor population. The overnight cultural visitors from Pennsylvania and France were the only origins that experienced a decline in the average spending per person visit when this average is compared to that of all overnight visitors from these areas. All other countries/states presented in Table 11 experienced an increase. Overall, US origin spending remained the same.

Overnight cultural visitors from Ontario had the lowest average spending per person visit ($207), as well as per person-night ($62).

Overnight cultural visitors from the U.S. had an average spending per person visit that was over twice as large as that of Ontarians' ($416). Overseas overnight cultural visitors had an average spending per person visit that was five times higher than that of Ontarians' ($1,136), partly because of high transportation costs to reach Ontario.

On a per person-night basis, however, the difference between the average spending of overnight cultural visitors from Ontario and that of cultural visitors from overseas countries declined from being five times greater, to being double. The difference between the average spending of overnight cultural visitors from Ontario and that of Americans remained the same (2.0 times greater) regardless of whether average spending is compared on a per person visit or per person-night basis.

It is interesting to note in Table 11, that on a per-person-night basis, overnight cultural visitors from overseas countries as a whole did not spend as much as other overnight visitors did. It was the longer length stay in Ontario that eventually contributed to a higher average spending per person visit for the overnight cultural visitors.

Overnight cultural visitors from Japan had the highest average spending per person per night, but it was the overnight cultural visitors from the U.K. that had the highest average spending per person visit. A consequence of the fact that cultural visitors from the U.K. stayed in Ontario two and an half times as long as cultural visitors from Japan did.

When the transportation costs are removed from the overnight cultural visitors spending, the ranking of the high yield markets changes somewhat. Although overnight cultural visitors from Japan continue to have the highest average spending per person per night and overnight cultural visitors from the U.K. continue to have the highest average spending per person visit, it is now Japan that has the highest average spending per party-night (see Table 12).

Table 11 demonstrates that, when all expenditures are taken into account, the overnight cultural visitors from the U.K. constitute Ontario's highest yield segment in this market, followed by Japanese and Germans. However, one needs to look at the expenditures shares of each of these visitor groups to determine their value to the provincial economy and not just their average spending per person visit. This is done in Table 10.

According to this table, although the U.K., Germany, France and Japan maintained their importance within the overseas group, it was Ontario residents that contributed the most to the total spending of overnight cultural visitors in the province, accounting for 19.5% of this spending. This share, however, was significantly lower than Ontario residents' share of the total expenditures incurred by all overnight visitors (33.8%). Ontario was followed by U.K., Michigan, New York, Ohio, Germany, and Japan. At a national level, the U.S. accounted for the largest share of expenditures incurred by overnight cultural visitors, followed by Canada.

Table 12 demonstrates that the further away from Ontario an overnight cultural visitor's place of residence was, the higher the share of transportation expenditures and the lower the share of the items purchased locally in the province. Accommodation accounted for the largest share of the overnight cultural visitors' non-transport related spending in Ontario (33.8%), followed by food/beverage (27.4%).

TABLE [illegible] Overnight Cultural Visitors Spent their Non-transport Budget in Ontario, 1999
by Origin, 1999

Item of Expenditure	Origin of Overnight Cultural Visitors							
	Canada	Ontario	USA	USA Border States	Over-seas	UK	Ger-many	Japan
Spending by overnight cultural visitors, excluding transport related expenditures (millions)	$630	$449	$817	$477	$668	$137	$54	$40
As a % of the overnight cultural visitors' total spending in Ontario	82.7%	82.4%	82.6%	88.8%	63.9%	57.0%	63.9%	50.3%
Average Spending								
Per person	$199	$170	$344	$300	$727	$743	$680	$628
Per person night	$52	$51	$100	$103	$74	$71	$63	$150
Per party	$351	$310	$785	$709	$1,409	$1,469	$1,378	$1,181
Per party-night	$95	$100	$219	$244	$139	$135	$120	$249
Accommodation (millions)	$224	$161	$331	$183	$211	$40	$18	$17
As a % of the non-transport spending of overnight cultural visitors	35.6%	35.8%	40.6%	38.3%	31.6%	29.5%	33.6%	42.9%
Average Spending								
Per person	$71	$61	$139	$115	$230	$219	$229	$269
Per person night	$19	$18	$41	$39	$24	$21	$21	$65
Per party	$125	$111	$319	$271	$446	$434	$464	$507
Per party-night	$34	$36	$89	$93	$44	$40	$40	$107
Food/Beverage (millions)	$217	$512	$204	$119	$161	$36	$15	$9
As a % of the non-transport spending of overnight cultural visitors	34.4%	33.9%	24.9%	25.0%	24.2%	26.5%	27.1%	21.2%
Average Spending								
Per person	$69	$58	$86	$75	$176	$197	$184	$133
Per person night	$18	$17	425	$26	$18	$19	$17	$32
Per party	$121	$105	$196	$177	$341	$390	$373	$251
Per party-night	$33	$34	$55	$61	$34	$36	$33	$53
Recreation/Entertainment (millions)	$90	$67	$144	$96	$98	$23	$6	$4
As a % of the non-transport spending of overnight cultural visitors	14.4%	15.0%	17.6%	20.0%	14.7%	16.9%	11.2%	10.1%
Average Spending								
Per person	$29	$25	$61	$60	$107	$126	$76	$64
Per person night	$8	$8	$18	$21	$11	$12	$7	$15
Per party	$51	$46	$139	$142	$207	$249	$154	$120
Per party-night	$14	$15	$39	$49	$20	$23	$13	$25
Retail (millions)	$98	$69	$138	$79	$197	$37	$15	$10
As a % of the non-transport spending of overnight cultural visitors	15.6%	15.4%	16.9%	16.6%	29.5%	27.0%	28.1%	25.7%
Average Spending								
Per person	$31	$26	$58	$50	$214	$200	$191	$162
Per person night	$8	$8	$17	$17	$22	$19	$18	$39
Per party	$55	$48	$133	$118	$415	$397	$388	$304
Per party-night	$15	$15	$37	$41	$41	$36	$34	$64

Table 12 demonstrates that the further away from Ontario an overnight cultural visitor's place of residence was, the higher the share of transportation expenditures and the lower the share of the items purchased locally in the province. Accommodation accounted for the largest share of the overnight cultural visitors' non-transport related spending in Ontario (33.8%), followed by food/beverage (27.4%).

TABLE 12: How Overnight Cultural Visitors Spent their Non-transport Budget in Ontario by Origin, 1999

Item of Expenditure	Origin of Overnight Cultural Visitors							
	Canada	Ontario	USA	USA Border States	Over-seas	UK	Ger-many	Japan
Spending by overnight cultural visitors, excluding transport related expenditures (millions)	$630	$449	$817	$477	$668	$137	$54	$40
As a % of the overnight cultural visitors' total spending in Ontario	82.7%	82.4%	82.6%	88.8%	63.9%	57.0%	63.9%	50.3%
Average Spending								
Per person	$199	$170	$344	$300	$727	$743	$680	$628
Per person night	$52	$51	$100	$103	$74	$71	$63	$150
Per party	$351	$310	$785	$709	$1,409	$1,469	$1,378	$1,181
Per party-night	$95	$100	$219	$244	$139	$135	$120	$249
Accommodation (millions)	$224	$161	$331	$183	$211	$40	$18	$17
As a % of the non-transport spending of overnight cultural visitors	35.6%	35.8%	40.6%	38.3%	31.6%	29.5%	33.6%	42.9%
Average Spending								
Per person	$71	$61	$139	$115	$230	$219	$229	$269
Per person night	$19	$18	$41	$39	$24	$21	$21	$65
Per party	$125	$111	$319	$271	$446	$434	$464	$507
Per party-night	$34	$36	$89	$93	$44	$40	$40	$107
Food/Beverage (millions)	$217	$512	$204	$119	$161	$36	$15	$9
As a % of the non-transport spending of overnight cultural visitors	34.4%	33.9%	24.9%	25.0%	24.2%	26.5%	27.1%	21.2%
Average Spending								
Per person	$69	$58	$86	$75	$176	$197	$184	$133
Per person night	$18	$17	425	$26	$18	$19	$17	$32
Per party	$121	$105	$196	$177	$341	$390	$373	$251
Per party-night	$33	$34	$55	$61	$34	$36	$33	$53
Recreation/Entertainment (millions)	$90	$67	$144	$96	$98	$23	$6	$4
As a % of the non-transport spending of overnight cultural visitors	14.4%	15.0%	17.6%	20.0%	14.7%	16.9%	11.2%	10.1%
Average Spending								
Per person	$29	$25	$61	$60	$107	$126	$76	$64
Per person night	$8	$8	$18	$21	$11	$12	$7	$15
Per party	$51	$46	$139	$142	$207	$249	$154	$120
Per party-night	$14	$15	$39	$49	$20	$23	$13	$25
Retail (millions)	$98	$69	$138	$79	$197	$37	$15	$10
As a % of the non-transport spending of overnight cultural visitors	15.6%	15.4%	16.9%	16.6%	29.5%	27.0%	28.1%	25.7%
Average Spending								
Per person	$31	$26	$58	$50	$214	$200	$191	$162
Per person night	$8	$8	$17	$17	$22	$19	$18	$39
Per party	$55	$48	$133	$118	$415	$397	$388	$304
Per party-night	$15	$15	$37	$41	$41	$36	$34	$64

Overnight cultural visitors from Japan and the United States, especially those from Ontario's Border States, had the highest share of non-transport related expenditures going to accommodation, partly because these visitors had the highest incidence of usage of commercial roofed accommodation. Overnight cultural visitors from the U.S. and Japan spent 64.9% and 65.8%, respectively, of their person nights in Ontario in commercial roofed accommodation, as compared to 25.8% for overnight cultural visitors from Ontario and 28.9% for those from overseas countries.

Overnight cultural visitors from overseas countries had the highest share of non-transport expenditures going to retail shopping. Again, these observation imply that shopping is an important activity for the overnight cultural visitors from overseas countries. Finally, Canadians and Ontarians had the highest share of non-transport expenditures in Ontario going to food/beverage.

Overnight cultural visitors from Japan had the highest average spending on accommodation irrespective of the unit of measurement used (i.e., per person visit, per person night, per party visit and per party-night). While overnight cultural visitors from the U.K had the highest average spending per person visit, as well as per party visit, on food/beverage. However, on a per person night basis it was the Japanese cultural visitors that had the highest average spending on food/beverage, while on a per party night basis, it was the cultural visitors from Ontario's Border States that had the highest average spending on food/beverage. Finally, overnight cultural visitors from Ontario's Border States had the highest average spending on recreation/entertainment on a per person night or party night basis, while those from the U.K. had the highest average spending on a per person visit or party visit basis (primarily because they stayed much longer in Ontario than any other visitor).

Ontario's Overnight Cultural Market: 1996, 1998, 1999

In 1996 overnight cultural visitors accounted for 15.7% of all overnight visitors in Ontario. This share increased in 1998 by 9.0% to 16.4%, and it remained nearly at that level in 1999 with a slight decrease of 0.3% to 16.2%.

TABLE 13: Overnight Person Visits in Ontario*

Year	Overnight Cultural Visitors (000's)	Rate of Change	Share of Total Overnight visitors	All Overnight Visitors (000's)	Rate of Change
1996	5,942		15.7%	37,841	
1998	6,475	9.0%	16.4%	39,395	4.1%
1999	6,456	-0.3%	16.2%	39,842	1.1%

*Only domestic visitors with an Ontario destination are included in this table not all overnight visitors to Ontario from domestic origins.

As Table 14 demonstrates, overnight cultural visitors from other Canadian provinces and overseas countries were mainly responsible for the slight decline of overnight cultural visitors in Ontario. However, compared to 1996, in 1999 the number of overnight cultural visitors increased by 8.7%. The largest increase was realized in the overseas markets with an increased of 21.4%.

TABLE 14: Overnight Cultural Visitors in Ontario, by Origin

Year	Origin of Visitors								
	Total	Other Canada	Share	Ontario	Share	USA	Share	Overseas	Share
1996	5,942	512	8.6%	2,423	40.8%	2,250	37.9%	757	12.7%
1998	6,475	609	9.4%	2,521	38.9%	2,358	36.4%	987	15.2%
1999	6,456	528	8.2%	2,633	40.8%	2,376	36.8%	919	14.2%

As a result of the differential growth rates of cultural visitors from different origins, the share of overnight cultural visitors from overseas countries increased between 1996 and 1999 from 12.7% to 14.2%. The share of overnight cultural visitors from Ontario remained the same over 1996 at 40.8%, while the share of cultural visitors from other Canadian provinces and the USA declined from 8.6% to 8.2% and 37.9% and 36.8% respectively.

Southwestern Ontario, Festival Country, Lakelands, Getaway Country and Ontario's north experienced increases in overnight cultural visitors between 1996 and 1999, with Lakelands experiencing the largest increase (50.8%). Unfortunately, the three main cultural destinations in Ontario experienced declines in this market and as a result the province also experienced declines over the same period. Metro Toronto's overnight cultural visitors declined by 20.9% in 1999 over 1996, Ontario East' overnight cultural visitors declined by 8.6%, and Festival Country's overnight cultural visitors declined by 2.2%.

Ontario's Overnight Cultural Market: 1996, 1998, 1999

In 1996 overnight cultural visitors accounted for 15.7% of all overnight visitors in Ontario. This share increased in 1998 by 9.0% to 16.4%, and it remained nearly at that level in 1999 with a slight decrease of 0.3% to 16.2%.

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TABLE 15: Overnight Cultural Visitors in Ontario, by Region Visited

Year	Ontario Travel Region Visited													
	Region 1		Region 2		Region 3		Region 4		Region 5		Region 6		Regions 7-12	
		% Share		% Share		% Share		% Share		% Share		% Share		% Share
1996	619	10.4	1,614	27.2	496	8.3	2,630	44.3	497	8.4	1,539	25.9	554	9.3
1998	594	9.2	1,736	26.8	664	10.3	2,108	32.6	427	6.6	1,286	19.9	630	9.7
1999	725	11.2	1,715	26.6	748	11.6	2,081	32.2	518	8.0	1,406	21.8	685	10.6

As a result of these differential growth rates, Metro Toronto's share of Ontario's overnight cultural visitors declined in 1999 over 1996, from 44.3% to 32.2%, Ontario East's share declined from 25.9% to 21.8%.

TABLE 15: Overnight Cultural Visitors in Ontario, by Region Visited

Year	Ontario Travel Region Visited													
	Region 1		Region 2		Region 3		Region 4		Region 5		Region 6		Regions 7-12	
		% Share		% Share		% Share		% Share		% Share		% Share		% Share
1996	619	10.4	1,614	27.2	496	8.3	2,630	44.3	497	8.4	1,539	25.9	554	9.3
1998	594	9.2	1,736	26.8	664	10.3	2,108	32.6	427	6.6	1,286	19.9	630	9.7
1999	725	11.2	1,715	26.6	748	11.6	2,081	32.2	518	8.0	1,406	21.8	685	10.6

As a result of these differential growth rates, Metro Toronto's share of Ontario's overnight cultural visitors declined in 1999 over 1996, from 44.3% to 32.2%, Ontario East's share declined from 25.9% to 21.8%.

- GLOSSARY -

ACCOMMODATION TYPE refers to the type(s) of accommodation used during the trip.

Other accommodation is a separate category in the CTS and ITS questionnaires, and includes dormitories, hostels, sleeping berths on trains and boats, etc. In many of the tabulations contained in this report, accommodation type "not stated" records have been combined with *other*.

ACTIVITIES ON TRIP. For each trip, respondents were asked to indicate whether they participated in any of a number of activities (aided measure). The activity could have occurred at any location on the trip (destination, location of overnight stop) since activity data are not captured on a location-specific basis.

EXPENDITURES ON TRIP. All dollars spent by all household members or party members who went on the trip and paid for by individuals, government or private sector business. Only expenditures incurred by visitors to Ontario are contained in this report. Spending by Ontarians on (Canadian) public fares for trips outside the province and with no visit in Ontario are not included here.

The following items of expenditures are excluded:

- food and beverage purchased prior to the trip to be used while on the trip;
- items purchased to be resold or used in a business;
- vehicles, such as cars, boats and caravans;
- capital investment, such as real estate, work of arts, rare articles and financial stocks;
- cash given to friends or relatives during a trip which does not represent payment for goods and services received, as well as donations to institutions.

EXPENDITURES IN ONTARIO. Canadian residents' expenditures on the trip are assigned by Statistics Canada to provinces of origin, destination, and location of overnight stops according to pre-set rules. Expenditures from the ITS were assigned to Ontario according to OMTOUR rules.

HOUSEHOLD/PARTY TRIP. A trip involving one or more persons from the same household/party leaving and returning together. If four persons from the same household take a trip, it counts as one household-trip.

The CTS captures household-based information, while the ITS captures party-based (not necessarily belonging to the same household) information.

MODE OF TRANSPORT. Mode of transport refers to the one used in Canada. It does not refer to the transport mode used by international visitors to come to Ontario.

PERSON NIGHT. A night spent away from home by a person taking a trip. If two persons take a trip involving three nights away from home, that counts for six person nights.

PERSON TRIP. A trip taken by one person. If two persons from the same household go on a trip, it counts for two person trips. If the same person takes two trips, it also counts for two person trips.

PURPOSE OF TRIP (MAIN). The main purpose categories include *visiting friends/relatives, pleasure, personal, business, convention*. In this report, *business convention* has been combined with *business* and *pleasure* has been combined with *non-business convention*.

QUALIFYING TRIP. A *qualifying trip* in the CTS is defined as travel from the usual place of residence to a location any distance away if an overnight trip and at least 40 km (one-way) if a same-day trip for any purpose other than as a member of an operating crew of a bus, plane, truck, etc; commuting to work or school; moving to a new residence; travel in an ambulance to a hospital or clinic; trips that did not originate in Canada and trips that longer than one year. The distance minimum of 40 km applies only to same-day trips that originate in Ontario. In all other provinces, the minimum distance for a same-day trip is 80 km. In the ITS it includes all non-residents crossing the Canadian border (excludes crews of transportation firms).

REPORTING PERIOD. An one month reporting period is used by the CTS since the second quarter of 1992. All fieldwork takes place approximately three weeks after the *end* of the reporting period. For example, during the third week in July respondents would be asked to report on trips that ended in preceding June. In the ITS, a respondent is given a questionnaire which he/she is asked to fill out when his/her trip is completed.

RESPONDENT. In the CTS, a randomly selected individual in the sampled household (from the Statistics Canada Labour Force Survey sampling frame) who is at least 15 years of age. Specifically excluded from the LFS coverage are residents of Yukon and Northwest Territories, persons living on Indian Reserves, full-time members of the Canadian Armed Forces and persons living in institutions (inmates of penal institutions and patients in hospitals or nursing homes who have resided in the institution for more than six months).

VISIT. Place of overnight stay or for same day trips, the location of the trip's destination. If the respondent travelled twice to the same location during the same trip, only one visit is recorded at that location. In this report there are three types of visits at the sub-provincial level: visits that were destined to region x; visits that were destined to Ontario region y, but took an excursion to region x, and visits that were destined outside Ontario, but had an overnight stop in region x. A small number of CTS respondents with overnight trips indicated that had as their destination Ontario region x, but they spent no night in region x. These trips have been treated in this report as same day trips to region x.

Map of Ontario's Travel Regions*

GAs of OMN the Ministry has identified new regions for researchK